

# SOLICITATION PHASE

Creating a Solicitation Number with Basic Administrative Data .....	1
Creating a Bidders' Mailing List (BML) .....	10
Creating a Synopsis .....	14
Creating a Pre-Solicitation Notice (PSN/PIN).....	14
Solicitation Line Item Management.....	18
Solicitation Line Items.....	19
Creating Sub line items .....	21
Renumbering Line Items .....	21
Copying Line Items.....	22
Completing Line Item Entries .....	24
The Solicitation Document.....	28
Clause Matrices .....	30
Text Section.....	35
Printing a Solicitation Document .....	37
Issuing a Solicitation .....	39
Issuing a Solicitation Amendment .....	40
Printing a Solicitation Amendment .....	44
Creating a Bid/Offer Abstract.....	44
Printing a Bid/Offer Abstract.....	46
Supporting Documentation .....	47
Source Selection .....	47
Cost/Price Form.....	47
Determination and Findings Form .....	48
Negotiation Memorandum Form.....	49
Responsibility Form .....	50
Protests.....	51
Supporting Documents List .....	52

## *Creating a Solicitation Number with Basic Administrative Data*



*Note: Prerequisite: A valid purchase request must already exist in CSTARS.*



Click on the button and select either "Purchasing" or "Contracting." The selected worksheet will appear.



*Warning: Once a Solicitation number is obtained in CSTARS, access to the procurement request is no longer available. In addition, a SIC/FSC code must have been entered at the Requisition stage in order to rotate the vendor file. If the requester did not include an SIC/FSC code, the rotate vendors function will not automatically choose vendors, however, vendor selections can still be made.*

## Purchasing or Contracting Worksheet

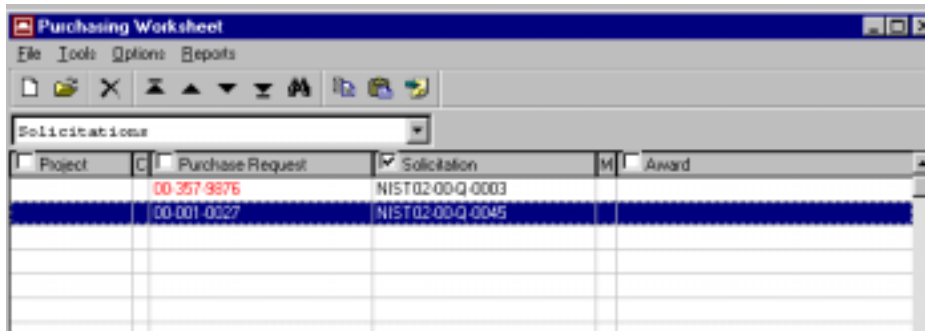


Figure 1

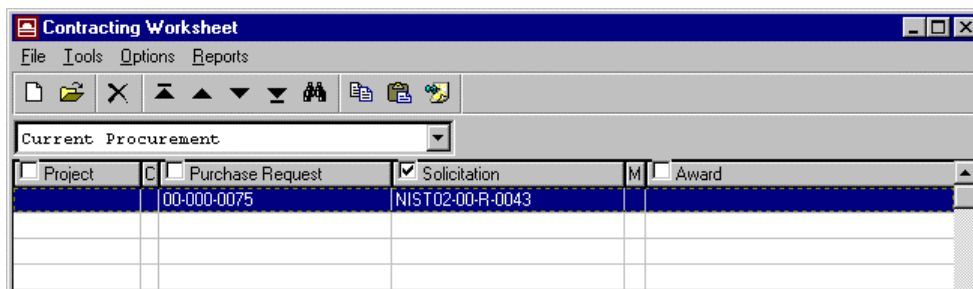



Figure 2

In the selected worksheet, locate and highlight the purchase request number, place a check in the “Solicitation” check box, and then click on the  icon.

## Solicitation PIIN Assignment Screen

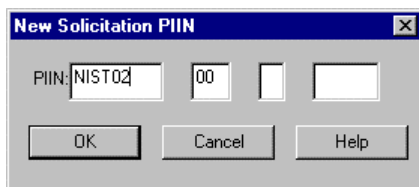


Figure 3

The Solicitation number is created here. The first field defaults as a function of the office to which the user was assigned in their CSTARS profile. This field can be overwritten. The second block represents the 2-digit fiscal year. Enter one of the following counter codes in the third block.

Document Type	Counter Code
Request for Proposal (RFP):	R

IFB:	I
Request for Quote (RFQ):	Q

Press the <Tab> key to the fourth field and click on the *OK* button. The next counter number will display giving a complete Solicitation number, and CSTARS will continue to the *Solicitation Tab Control Screen*, with six tab screens on which to enter data.



See Addendum: See bureau-specific addendum for instructions.

## Solicitation Tab Control Screen


### Admin Screen




Figure 4

Tab through the fields on this screen as follows.



*Warning: The Issue Date defaults to the system date. If the solicitation is not to be issued today, change it to a later date. The system tracks it as issued after the selected date has occurred and will not permit you to open or change the solicitation document after this date has passed. If this occurs, go to the "Tools" and select "Issue" from the Solicitation's Summary Screen and change the issue date to allow sufficient time to prepare the solicitation and have it reviewed and approved prior to release.*

Issue Date:	Defaults to current date. Enter solicitation issued date, if different.  See warning note above.
-------------	--

Solicitation Form:	<p>Click on the down arrow, and choose from the following forms:</p> <p><i>SF 18</i> — Request for Proposal.</p> <p><i>SF 33</i> — Solicitation, Offer and Award.</p> <p><i>SF 1417</i> — Pre-Solicitation Notice (Construction Contracts).</p> <p><i>SF 1442</i> — Solicitation, Offer and Award (Construction, Alteration, or Repair).</p> <p><i>SF 1447</i> — Solicitation/Contract.</p> <p><i>SF 1449</i> — Solicitation/Contract/Order for Commercial Items.</p>
Type of Solicitation:	<p>Defaults to "RFP" (in the Contracting subsystem) and "RFQ" (in the Purchasing subsystem.) Use the drop-down menu to select "IFB" or "RFQ" or overtype one of these options. CSTARS will AutoFill the letters as you begin to type.</p>
	Select the appropriate box for "Supply" or "Services."
WEB Publish URL:	<p>Default to Solicitation number previously created.  See bureau-specific guidelines.</p>
CBD URL:	<p>If a synopsis is/was submitted and published on the web (to CBDNet or any agency's web site), entering the URL to the synopsis in this field allows you to publish the URL with the solicitation (and/or amendments). Also, a hyperlink from the solicitation to the synopsis can be produced on the solicitation's web page.</p>
Offers Due On:	Enter receipt of proposals, quotes, or bid opening date.
Offers Due At:	<p>Defaults to "12:00." Change the time as required.  See note below.</p>
Number of Copies Due:	<p>Defaults to "0." Enter "1" or more. Change if the offeror is required to submit more than one copy with proposals/bid.</p> <p> Note: This does not print on the SF18.</p>
Depository Location:	Identify location of office to receive offers.



See Addendum: See bureau-specific addendum for instructions.



Hint: The Offers Due At field can record a 24-hour or 12-hour time value. For an afternoon closing of 4:00 pm, enter "04."





Note: For an RFQ using SF18, close of business is specified by the form. Therefore the 24 hour time option in the Offers Due On field should not be used.

Click on the *Properties* tab at the top of the screen.

## **Properties Screen**

Figure 5

Complete the fields on this screen as follows:

Rating:	N/A — Leave Blank.
SIC Code:	Enter the SIC or click the  icon to select the four-digit Standard Classification Code from the SIC <i>Search Screen</i> . Mark and select an entry.
FSC:	Click the  icon to select the four-digit Federal Supply Code from the <i>FSC Search Screen</i> or Product Service Code from the drop down menu, clicking on the FSC description header area reorders the listing alphabetically, while clicking on the FSC code header will reorder the list in ascending numerical order. Mark and select an entry.
FSS Group:	N/A
Set-Aside:	Mark the appropriate box for the following: "Small Business" "Small Disadvantaged Business" "8(a)" "Combined"

Percentage Set Aside:	"None of Above."  Enter "Set Aside" percentage, if applicable. This field is generated for a Set-Aside. Defaults to "000." Change according to Set-Aside percentage.
Size Standard:	Enter the appropriate size standard for four-digit SIC Code selected. (See the information for the selected SIC code item through the view option on the <i>SIC Code Screen</i> .)
Delivery Information:	Mark the appropriate box for the following:  "Destination," "Origin," or "See Schedule."
Delivery On:	Enter date (format as MM/DD/YYYY).

After completing the information on the *Properties Screen*, click on the next tab at the top of the screen *Text*. The *Text Screen* will appear.



## **Text Screen**

The screenshot shows the 'Solicitation' window with the 'Text' tab selected. The 'Comments' section has a large text area for 'Special comments/notations to be printed before line items'. Below this is a 'Text file to be printed after the line items' field with 'NONE' entered. To the right of this field are 'Browse', 'Launch', and 'Templates' buttons. At the bottom of the window are 'OK', 'Cancel', 'Apply', and 'Help' buttons.

Figure 6

The first field on the *Text Screen* is used to enter special comments/instructions applicable to Schedule B pricing. Enter any relevant data; it will be printed before the line items of pricing on Schedule B. Do not exceed 12 lines (or 2,300 characters) of text.

For text which will appear after the line item, a MS Word file can be developed and saved as a ".doc" file. Either enter the path of a word processing file with the document name into the *Text File* block or use the *Browse* button to locate it.

Text file to be printed after the line items (Path):	Enter the path, including the name of the document the want to develop in document format (.doc).  See bureau-specific guidelines. Note: If the user preference has been established as WYSIWYG, the file must be saved as a text file (*.txt). If the user preference has been established as MS Word, the file must be a *.doc file.
Browse:	Use this feature to select and pull the document path of an existing document into the path field.
Launch:	Use <i>Launch</i> to open the document; <i>Edit</i> to make changes to the information; and <i>Close</i> to save it.
Templates:	DO NOT USE.  See bureau-specific guidelines.

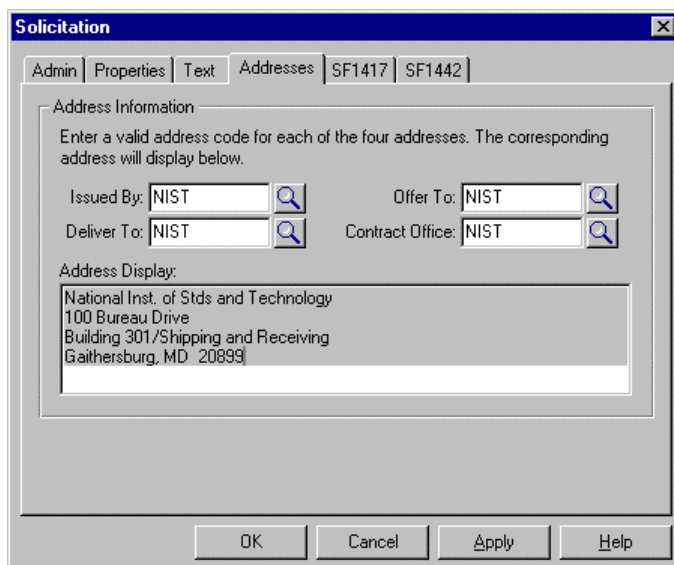


See Addendum: See bureau-specific addendum for instructions.

Click the  button to save the document path and comment entries.

After completing the information on the *Text Screen*, click on the next tab at the top of the screen, the *Addresses* tab and the *Addresses Screen* will appear.

### Addresses Screen







**Solicitation**

Admin | Properties | Text | **Addresses** | SF1417 | SF1442

Address Information

Enter a valid address code for each of the four addresses. The corresponding address will display below.

Issued By: NIST  Offer To: NIST 


Deliver To: NIST  Contract Office: NIST 

Address Display:

National Inst. of Stds and Technology  
100 Bureau Drive  
Building 301/Shipping and Receiving  
Gaithersburg, MD 20899

OK Cancel Apply Help

Figure 7

For each of these fields, enter the code in the space provided, and click on the  icon to open the *Address Search Browser*. If an address is not provided, choose "See Sch" for "See Schedule" and type entry in schedule.

#### Address Search Browser

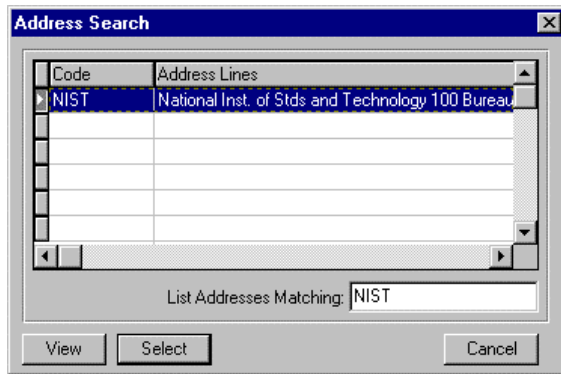
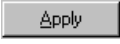

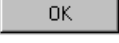


Figure 8

The browser defaults to the address code entered. Use the *Select* button to display the address associated with the address code in the field below. Click the  button to save the addresses entered. Then enter the information listed below, and click the  button again.

Issued By:	Enter the code for the Procurement Office.
Deliver To:	Enter the address or eight-digit Building Number code of the delivery site.
Offer To:	Enter the code for the office to receive offers.
Contract Office:	Enter the code for the Procurement Office.

Move to either the *SF 1417* or *SF 1442* tab at the top of the screen. Depending upon the tab selected, either the *SF 1417* or *SF 1442 Screen* will appear. The *SF 1417* is discussed in the section of this manual entitled "Creating a Pre-Solicitation Notice." The *SF 1442 Screen*, however, is discussed next. The use of *SF1417* or *SF1442* screens will be used only when applicable for construction acquisitions. If neither form is being developed, click the  button to return to the *Solicitation Summary Screen*.

#### SF 1442 Screen

Figure 9

Complete the fields for this screen as follows:

Performance Period:	<p>Enter the number of calendar days until the performance must begin, and the number of calendar days until the performance must be completed.</p> <p>Mark either “Award” or “Notice to Proceed.”</p> <p>Mark either “Mandatory” or “Negotiable.”</p> <p>If “Negotiable,” enter the section referenced in the Solicitation.</p>
Bonds:	<p>The default is "Contractor must furnish any required performance and payment bonds." Unmark that box if not required.</p> <p>If the default was kept, enter the number of calendar days after the Award for receipt of bonds.</p>
Additional Requirements:	<p>Again, the default is “Required.” Unmark that box if not required.</p> <p>If an offer guarantee is required, enter the number of calendar days after offers are due for government acceptance.</p>

Click on the  button to return to the *Solicitation Summary Screen*.

Solicitation Summary Screen

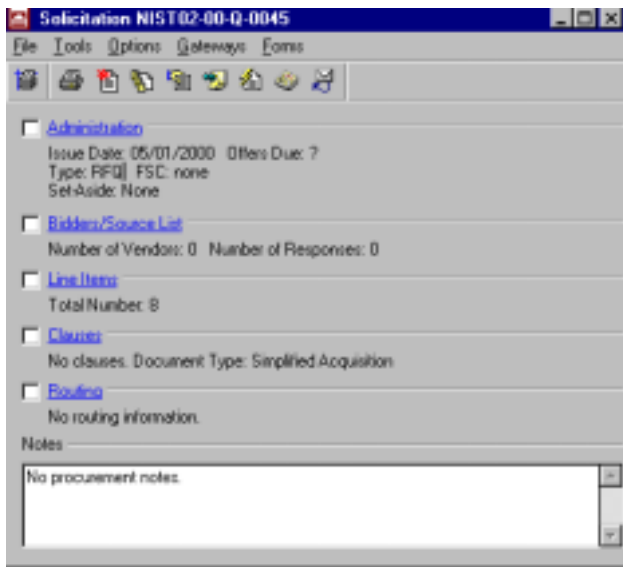


Figure 10

Notice that the menu bar lists the Solicitation Number.

## Creating a Bidders' Mailing List (BML)

From the *Solicitation Summary Screen*, click on the hypertext link Bidders/Source list.

Solicitation Summary Screen

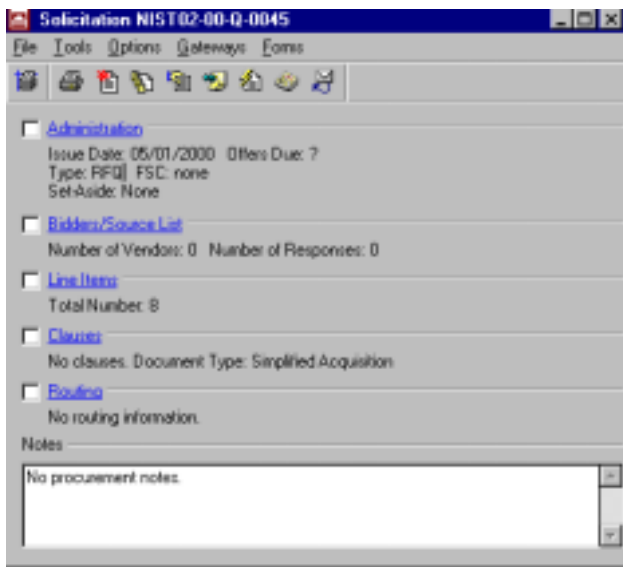


Figure 11

Click on the hypertext link Bidders/Source List. The *Bidder's Mailing List Browser* or the *Vendor Sources Browser* will appear, depending on the subsystem you are in.

Bidder's Mailing List Browser (Contracting subsystem)

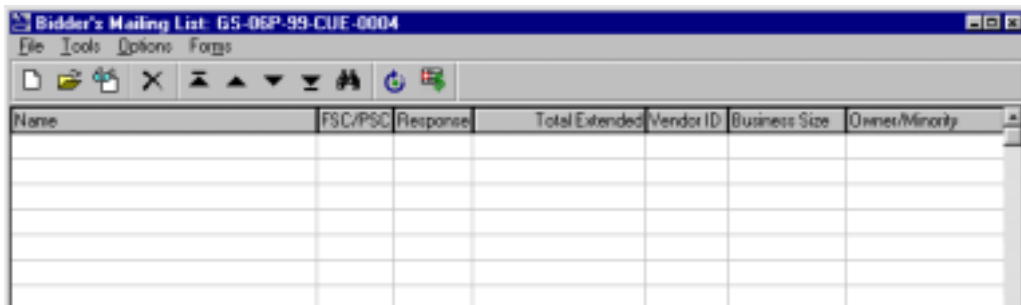


Figure 12

## Vendor Sources Browser (Purchasing subsystem)

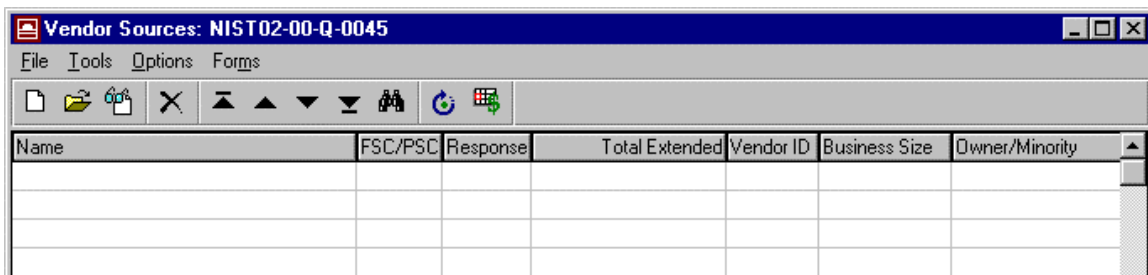


Figure 13

From the *Bidder's Mailing List Browser* or the *Vendor Sources Browser*, select "File" from the menu bar and "New" from the drop-down menu. The *Vendor Management Screen* will display. To manually add new bidders, highlight the vendor's name and click on the *Select* button. The vendor's name will be added to the bid browser.

Vendor Search Browser

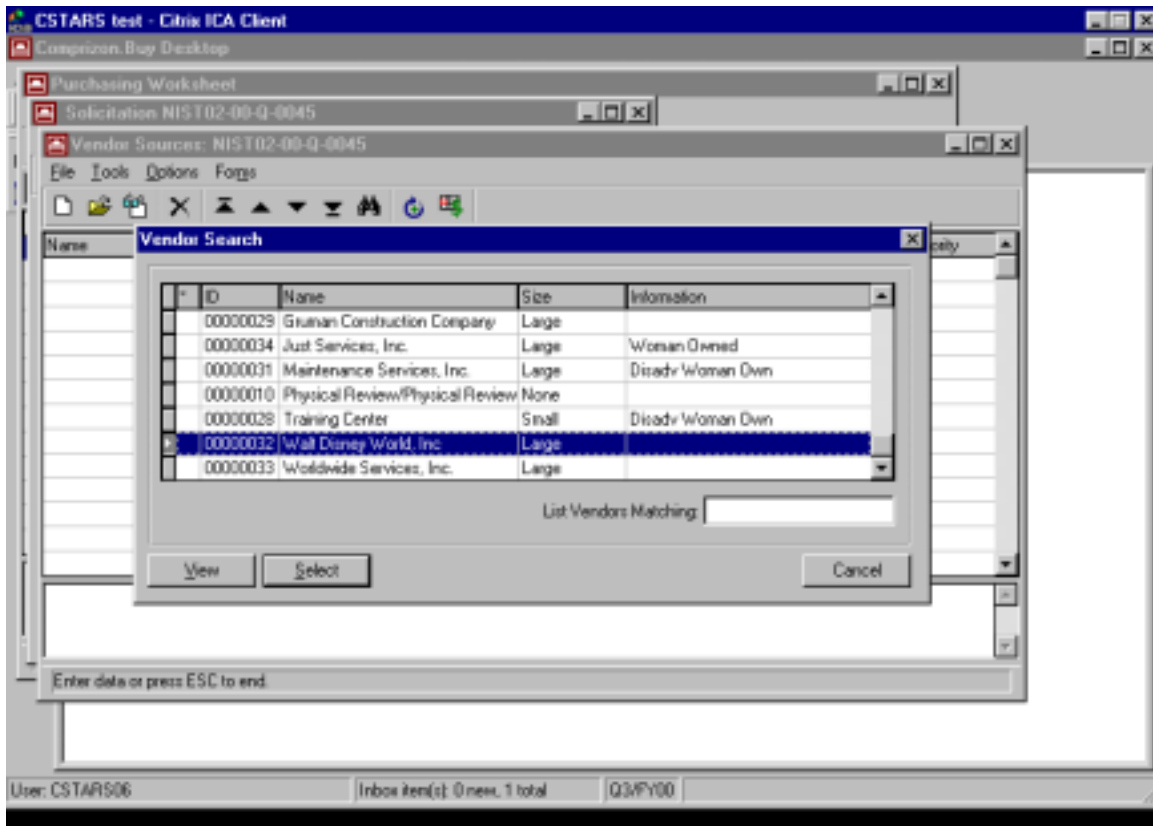


Figure 14

For another vendor, click on the *New* icon. The previously selected vendor has an asterisk in the first column. Select another vendor. Continue in this manner until a list is completed. When finished, click on the *Cancel* button to return to the *Vendor Sources Screen*.

## ROTATION OF BIDDERS



Note: If an SIC/FSC was entered in the requisition, the rotation of bidders option is available as described below.

To rotate the bidders from the *Solicitation Summary Screen*, select the Bidder's/Source List hypertext link. When the *Bidder's Mailing List Browser* appears, click the  icon or select "Tools" from the menu bar, then select "Rotate" from the drop-down menu.

Rotate Vendors Data Entry Screen

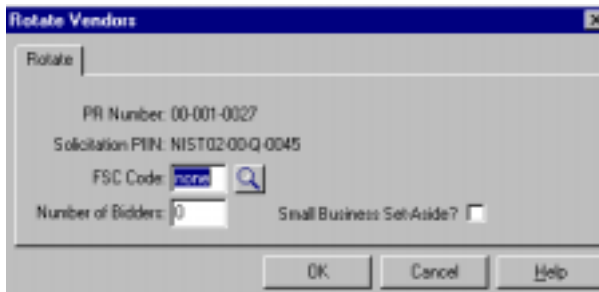



Figure 15

At the *Small Business Set-Aside* field, click a checkmark if the solicitation is set-aside for small business. The 4-digit "FSC Code" should default from the Purchase Request, or it may be updated on this screen. Then enter the number of bidders required. Click on the  button to return to the *Vendor Source's Screen* or *Bidder's Mailing List* to review the rotated list.



*Note: When bidders are rotated and a vendor is not in the file for the FSC class, you may enter the vendor by using the "File" and "New" feature.*

At the the *Vendor Source's Screen* or the *Bidder's Mailing List Browser*, select "File" from the menu bar. Then select "Print," "Reports," and "Bidder List" from the drop-down menus. A prompt box will appear requesting the user's ID.

### Select User Screen

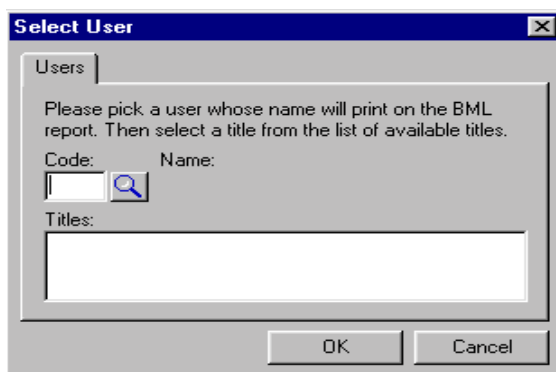
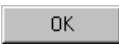


Figure 16

Enter the three-character ID, and click the  button.

### Mailing Labels Screen

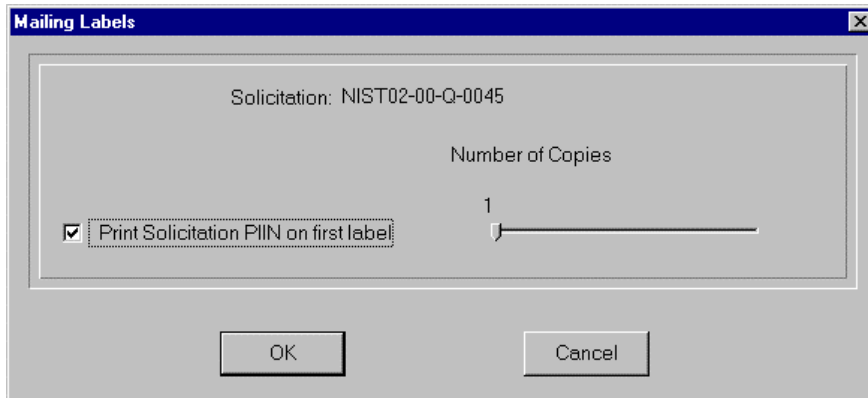



Figure 17

To print labels from the *Bidder's Mailing List Browser*, click on "File" from the menu bar, then move the cursor to print the select "Labels" from the drop-down menu and the above screen will appear. Click on the  button and this message will appear: "Would you like to preview this report before printing?" "Yes" or "No." If "Yes" is selected, the print preview of the bidder's list will appear. If "No" is selected, the file would go directly to the printer.

## Creating a Synopsis

For information about creating a CBC, see the *CBD* chapter.

## Creating a Pre-Solicitation Notice (PSN/PIN)



*Note: This screen allows the creation of a Pre-Solicitation Notice (PSN) for Construction projects only. In lieu of using this process, a PSN can be issued via a synopsis (see "Creating a Synopsis").*



*Note: Prerequisite: A Solicitation number must have first been generated in CSTARS.*

From the *Solicitation Summary Screen*, click on the Admin hypertext link to open the *Solicitation Tab Control Screen*.

## Solicitation Tab Control Screen

### Admin Screen

The screenshot shows a window titled "Solicitation" with a tab control at the top. The tabs are "Admin", "Properties", "Additional Text", "Addresses", "SF1417", and "SF1442". The "SF1417" tab is currently selected. The main area of the window is divided into two sections: "Solicitation Information" and "Quote/Bid/Proposal Info".

**Solicitation Information:**

- Issue Date: 06/10/97
- Solicitation Form: SF1417 (dropdown menu)
- Type of Solicitation: RFQ (dropdown menu)
- ☐ Supplies ☒ Services

**Quote/Bid/Proposal Info:**

- Offers Due On: 12/20/98
- Offers Due At: 12:00
- 24 Hour (dropdown menu)
- # Copies Due: 1
- Depository Location: Office of Procurement Room 255, Bldg 12

At the bottom of the window are four buttons: "OK", "Cancel", "Apply", and "Help".

Figure 18


Select the *SF 1417* tab. The *SF 1417 Screen* appears.

## SF 1417 Pre-Solicitation Notice Data Entry Screen

### SF 1417 Screen

Figure 19

Input the data as follows, remembering to press the <Tab> key at each field.

Project No.:	Enter the project number.  See bureau-specific guidelines.
Project Title:	Enter a brief project title (upper and lower case).
Project Location:	Enter the building, city, and state of project location.
Est. Cost Range: From & To:	Enter the construction cost range from <i>FAR 36.204</i> , as follows: Less than \$25,000 Between \$25,000 and \$100,000 Between \$100,000 and \$250,000 Between \$250,000 and \$500,000 Between \$500,000 and \$1,000,000 Between \$1,000,000 and \$5,000,000 Between \$5,000,000 and \$10,000,000 More than \$10,000,000
SF 1417 Issue Date:	Enter the date the notice will be mailed.
Date Solicitation Available:	Enter the date the Solicitation package will be available.

<i>SF 1417</i> Return Date:	Enter the due date for PSN/PIN responses. Date must be greater than the “Doc. Avail.” date but less than the due date.
Time For Completion:	Enter the number of days to complete the project. Press the <TAB> key to continue.
Document charge:	Enter amount charged for the solicitation package, if applicable.
Refund:	This field will open only if a dollar amount is entered in the document charge field. The default is to “Refundable.” Unmark the box if the charge is NOT refundable.
Payable to:	This field will open only if a dollar amount is entered in the document charge field. Enter the General Services Administration code.
Small Business:	The default is “Yes.” Unmark if the procurement is NOT a small business set-aside.
Subcontract:	The default is “Yes.” Unmark if a subcontracting plan is required.



See Addendum: See bureau-specific addendum for instructions for fields marked in the above table.

Click the  button and then the *Admin* tab. On the *Admin Screen*, change the *Solicitation Form* field to *SF 1417*, click the  button, and then choose the *Text* tab.

This MS Word document file should give a brief description of the project and a comment that the Small Business Competitiveness Demonstration is not applicable. One option is to use the text description already displayed in the path field or, if suitable, edit it and save it as a new document. A second option is to enter the path of a different existing document to be attached as the *SF 1417* description.

Document files are created in MS Word and then imported into CSTARS.

Enter the body of the text, click on “File,” then choose “Save As,” and then name the document with a .doc extension.

To print the *SF 1417* from the pull-down menu on the *Solicitation Summary Screen*, select “File” and “Print Setup.” The *Printer Setup Screen* will appear.

## Printer Setup Screen

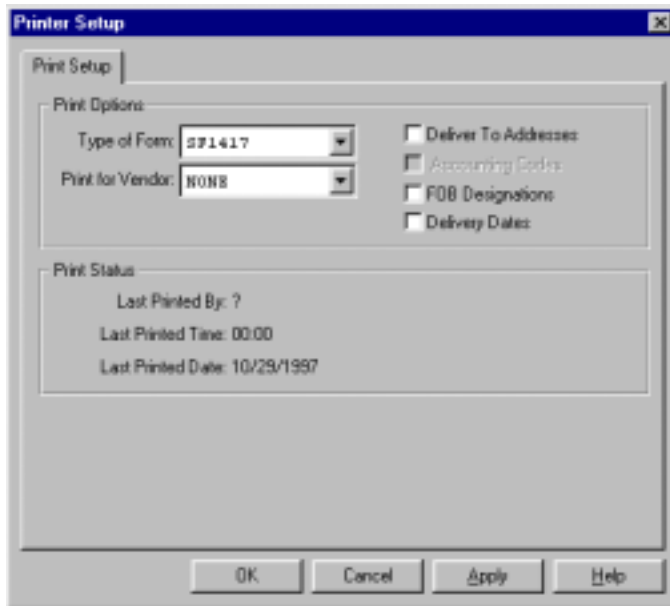
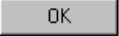


Figure 20

Change the *Type of Form* field to *SF 1417*, and mark those details to be printed. Click the  button to close, and CSTARS will return to the *Solicitation Summary Screen*. Choose "File" from the menu bar and then "Print" from the drop-down menu, and a *Print Preview Screen* will display for review. Click the *Print* icon, and the *SF1417* will print.

## Solicitation Line Item Management

### Solicitation Summary Screen



Figure 21

## Solicitation Line Items

At the *Solicitation Summary Screen*, click on the Line Items hypertext link. Or select "File" from the menu bar, and select "Open" and "Line Items" from the drop-down menus. In either case, the *Solicitation Line Item Management Browser* will appear.



*Note: Because CSTARS is a line item-driven database, all work associated with a procurement must be entered as line items (i.e., alternates and phases of construction, additional services and hourly services, all line items and sub-line items under an IQ contract options, etc.).*

## Solicitation Line Item Management Browser

Line No.	Description	UI	Quantity	Type	Status
0001	Door-Hollow Plywood 1/4"	EA	10.00	BPRI	On Solicit
0002	Door-Hollow Pressed Wood	EA	15.00	BPRI	On Solicit
0003	Door-Solid Core Steel	EA	20.00	BPRI	On Solicit
0004	Door Frames	EA	45.00	BPRI	On Solicit
0005	Door Knobs and Locks	EA	45.00	BPRI	On Solicit

Description : Door-Hollow Plywood 1/4"

Enter data or press ESC to end.

*Figure 22*



*Note: The column Type will show the type of line item: For example, "BPRI" or "OPRI," where "B" = "base," "O" = "option," "PRI" = "priced," and "NSP" = "Not Separately Priced."*





*Note: The field size for line item numbers is a maximum of six characters.*

This screen displays all the line items entered into the requisition in the Customer subsystem, or procurement request (if developed from that stage). If the line items were not entered into the requisition/procurement request, this screen will be blank and the line item data will need to be entered here.



*Note: If the line items do not need changes—such as sub line items, new line items, fewer line items, or renumbering—proceed to the Completing Line Item Entries section of this chapter.*

Double-click on the line items to review and edit the line items, or click on the  icon to add a new one to the existing list.

Click on the *Delete*  icon to remove line items. CSTARS will delete all but one line item. A *Delete* menu prompt will display containing three options.

## Delete Menu Screen

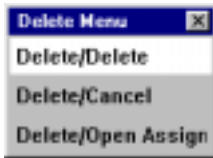




Figure 23

Delete/Delete:	Select this to delete a line item from both the solicitation and the original PR.
Delete/Cancel:	Select this to delete a <i>line item</i> from the solicitation and annotate it as "Canceled" in the PR.
Delete/Open Assign:	Select this to delete a <i>line item</i> from the solicitation and annotate it as "Open-Assign" on the PR.

All of the above options will give a *Confirm Prompt Screen* to verify your intent to delete the line item.

Click on the  or  command buttons as appropriate. CSTARS will return to the *Solicitation Line Item Management Browser*. Do this for each line item individually. If line items are deleted, the remaining ones may need to be renumbered (see below).

### Creating Sub line items

Create sub line item numbers by adding a two-letter suffix to the line item number. For example, for a line item number "0001" create new line item "0001AA," "0001AB," etc.



See Addendum: See bureau-specific addendum for instructions.

### Renumbering Line Items

CSTARS offers the capability to renumber line items, either individually or as a group. To renumber an individual line item, highlight it, select "Tools" and "Renumber," and a *Change Solicitation Line Item Number Prompt Box* appears.

## Change Solicitation Line Item Number Prompt Box

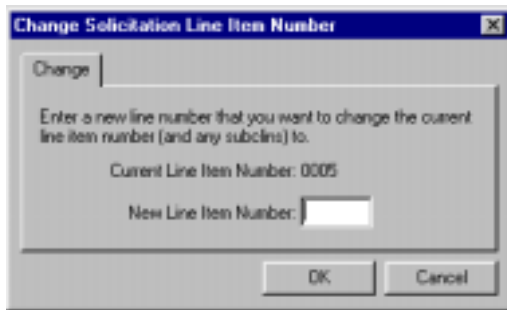



Figure 24

Enter the number and press the  button.

To renumber a group of line items, highlight the first one in the group, and select “Tools” and “Renumber Range.” A *Renumber Solicitation Line Item Numbers Prompt Box* appears requesting the new starting number.

## Renumber Solicitation Line Item Numbers Prompt Box

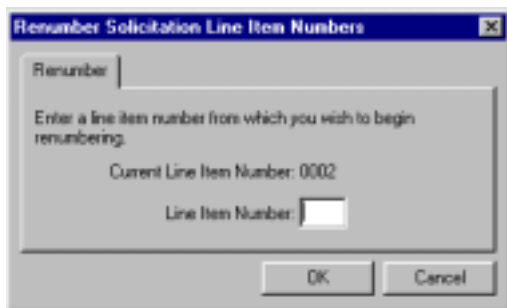


Figure 25

Enter that number and press the  button.

### Copying Line Items

To avoid recreating a line item several times, CSTARS offers the “Copy Line Items” option. Once a line item is highlighted, from the pull-down menu, select “Tools” and “Copy.” The *Copy Solicitation Line Item Number Prompt Box* will appear.

Copy Solicitation Line Item Number Prompt Box
---

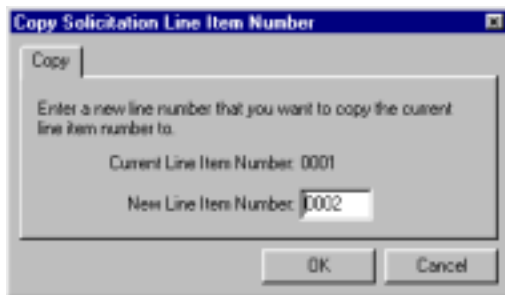



Figure 26

CSTARS defaults to the next sequential new line item number. Accept or modify it, as appropriate and click on the  button. CSTARS copies the new line item to the *Solicitation Line Item Management Browser*. Highlight the new line item from the Browser, and click on the open icon. Modify as many fields as necessary. All information that was completed on the tab screens for the line item copied will appear in the new line item and may be modified as necessary for funding changes, option, etc.

## Solicitation Line Item Management Browser

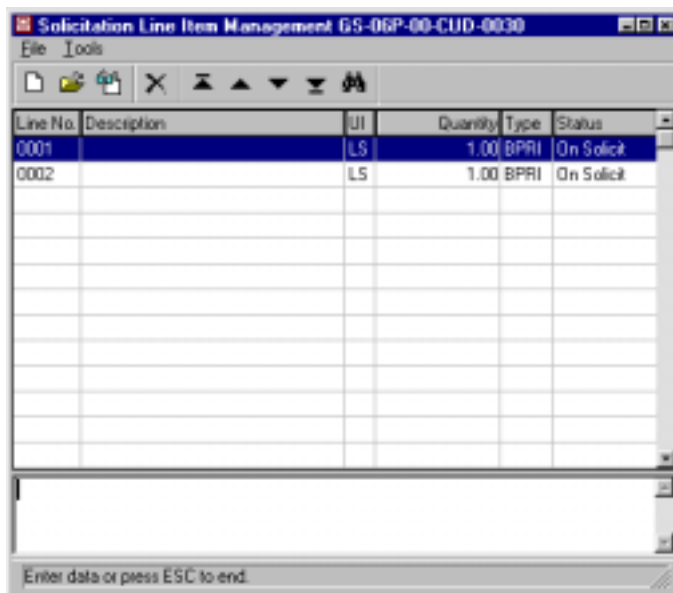


Figure 27

An item or items that will be copied several times may be copied to the clipboard. After highlighting one or more adjacent items, select “Tool” and “Copy To Clipboard.”

When complete, CSTARS will give the following message:

## Message Box

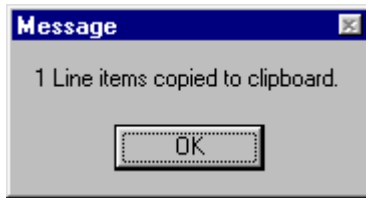




Figure 28

Then select “Tools” and “Paste From Clipboard.” Added items are numbered. Renumber as necessary.



*Note: Another method of copying line items is to hold down the <Ctrl>key and select one or more line items with the mouse. Hold down the <Ctrl>+<C>keys to copy your selection. The system will display a message indicating how many line items were copied. Click . Then hold down the <Ctrl>+<V> keys to paste your selection. When the Line Items are copied to the Line Item Management Browser CSTARS will renumber them. You may also use the “Renumber Line Items” feature if necessary.*

### Completing Line Item Entries

Once the line item has been developed, click the  icon. *The Solicitation Line Item Tab Control Screen* with four tab screens will appear. The *Detail Screen* defaults.


## Solicitation Line Item Tab Control Screen

### Detail Screen

Figure 29

Complete the items on this screen as follows:




Item No.:	Defaults to the next sequential number. Press the <Tab> key to accept this number or enter a new number or sub-number (i.e., 0004).
Quantity:	Enter the number of units for this line item.
UI:	Enter the unit of issue for this line item (i.e., EA = Each, LS = Lump Sum, MO = Month, etc.).
FSC:	Defaults from the data entered into previous data entry screens. NOTE: The BML will not rotate vendors for selection with the FSC.
Stock Item No.:	Enter the stock item, if appropriate.
Line Item Description Field:	Mark the radio button for “Description,” and enter the line item description.
Header:	Mark the radio button for “Header” and enter any text that will appear before the line item description.

Click the  button to save the entries, and then click the *Accounting* tab to view the *Accounting Screen*.

## Accounting Screen


Figure 30

Review and enter data as follows:

Fund Code:	Leave blank.  See bureau-specific guidelines.
Account Lines:	The data defaults to the original coding associated with the PR accepted in the prompt screen noted above. If there are no account lines, click on <i>New</i> to pull information from the Procurement Request, or enter a new accounting appropriation string. Click on the <i>Delete</i> button to delete marked account line.
Change Account Line:	Correct portions of the Accounting Lines as necessary, and then hit the  button.
BOC:	N/A. Leave blank.  See bureau-specific guidelines.
Percent or Cost:	It is unnecessary to make a selection for this field in the <i>solicitation</i> stage. CSTARS will enter data from the PR, if available.






See Addendum: See bureau-specific addendum for instructions.

Click on the  button and then on the *Delivery* tab. The *Delivery Screen* will appear.

## Delivery Screen

Figure 31

Review and enter data as follows:

Delivery Date:	Defaults from the <i>purchase request</i> /requisition. Change if necessary. Enter in mm/dd/yyyy format.
FOB Destination:	Defaults from purchase request/requisition, or select Origin, Destination, or see the “Schedule” radio button.
Deliver To:	Defaults from the purchase request/requisition. Either enter another address code, or click on  to select an address code.
Address Display:	Displays “Deliver To” address code.
Priority:	 See bureau-specific guidelines.
Supplemental Address:	Leave blank unless additional address information is needed.  See bureau-specific guidelines.




See Addendum: See bureau-specific addendum for instructions.

Click on  and then on the *Additional Info* tab to view the *Additional Info Screen*.

## Additional Info Screen



Figure 32

Review and enter data as follows:

Pricing Options:	Mark the following options that are applicable: “Not Separately Priced,” “Option Year,” “Subtotal,” and/or “Not To Exceed.”
Purchase Request Information:	Displays purchase request and <i>line item</i> numbers.
Project ID:	 See bureau-specific guidelines.



See Addendum: See bureau-specific addendum for instructions.

All of the above screens must be completed for each line items. Click the  button to return to the *Solicitation Line Item Management Screen*. Click on the  at the upper right-hand corner of the screen to return to the *Solicitation Summary Screen*.

## The Solicitation Document

At the *Solicitation Summary Screen* click on the Clauses hypertext link. Or choose “File” from the menu bar, then select “Open” and “Clauses” from the drop-down menu selections to bring up the *Solicitation Document Browser*.

## Solicitation Document Browser

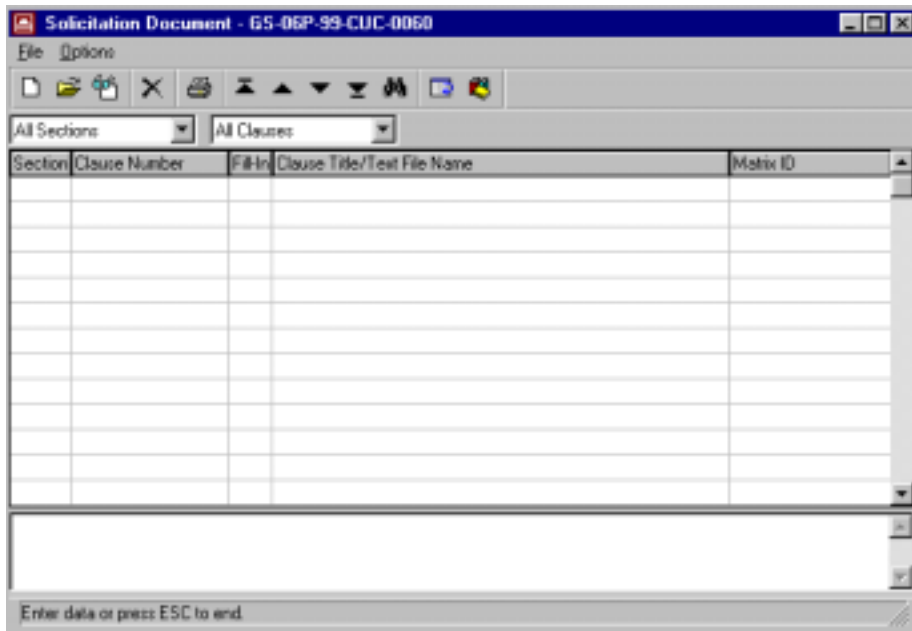


Figure 33



*Note: A drop-down menu is defaulted to "All Sections." To change the selection click on the down arrow. This will allow you to review a particular section. For example, if "Section I" is selected, all of Section I will be listed on the Solicitation Document Browser.*



*Note: A drop-down menu is defaulted to "All Clauses." This will list all the clauses selected from the matrices. Click on the down arrow and select "Incomplete fill-ins" to list all the incomplete fill-in clauses.*

Click "Options" and "Change Document Type." Select solicitation format by highlighting any of the following: "UCF (Uniform Contracting Format)," "SAP," "Commercial," "Construction," or "A/E." All five types are developed in the same manner using different contract matrices and section numbering.

## Solicitation Document Browser

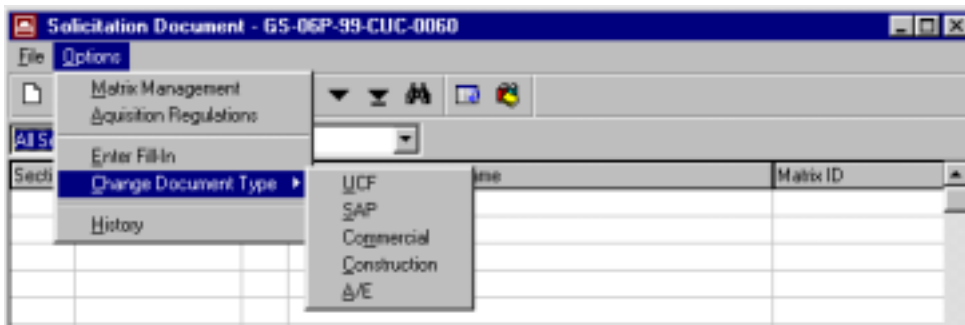


Figure 34

### Clause Matrices

From the *Solicitation Document Browser*, select “Options” and “Matrix Management.” Or click on the *Select Matrix* icon located 2nd from the right on the icon bar. In either case the *Solicitation Local Matrices Screen* will display.

## Solicitation Document Browser

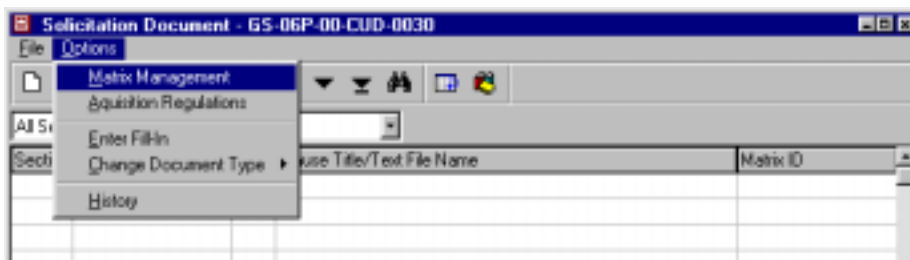



Figure 35

## Solicitation Local Matrices Screen

**Insert -- Replace figure after matrix team sets up the local matrices**

Highlight the matrix set to be used for the solicitation and click the  button. A message box will appear indicating that the document is being created. All clauses associated with that matrix will now be listed on the *Solicitation Document Browser* in section order.

Change the filter option to "Incomplete Fill-ins," now only the clauses needing additional information are displayed.

## Solicitation Document Browser

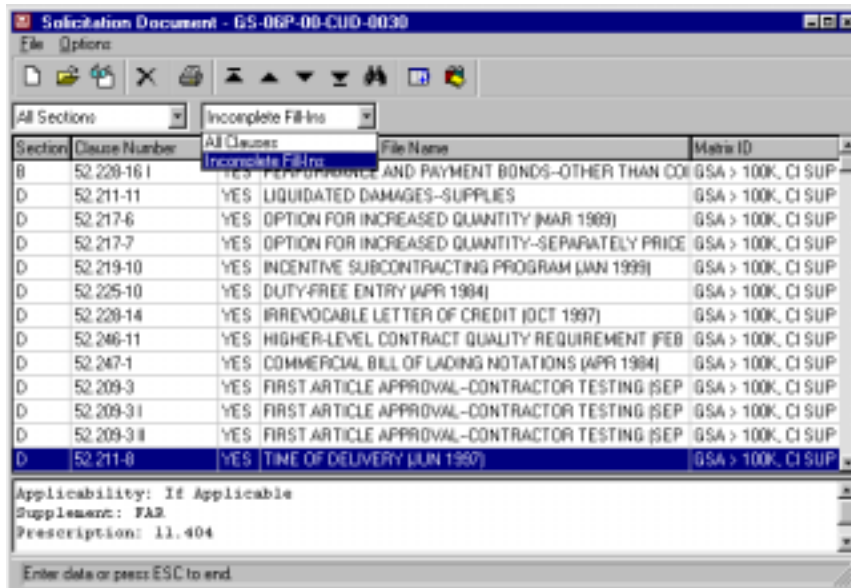


Figure 36

From the *Solicitation Document Browser*, double click on the clause to be filled in and click the *Fill-In* button on the *Clause* tab; or click on "Options" and select "Enter fill-in" on the menu bar on the *Solicitation Document Browser*.

## Fill-In Fields Screen

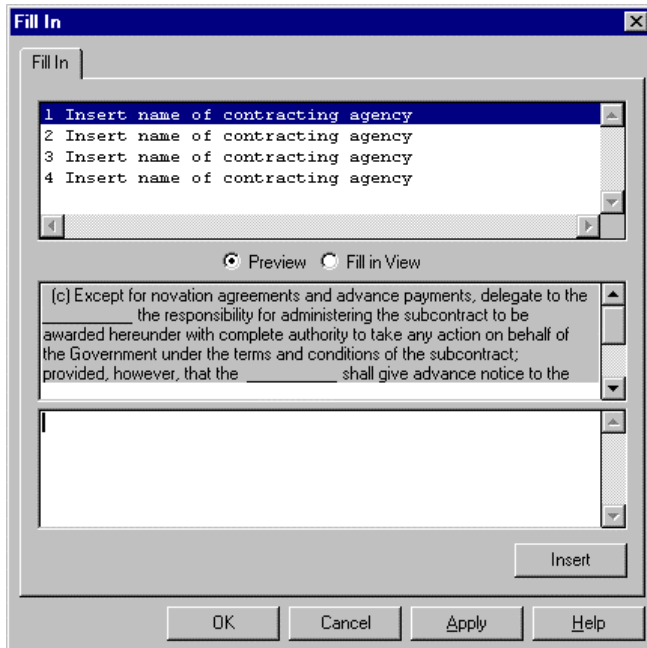


Figure 37

At the fill-in menu, highlight the item requiring fill-in information. Click on the radio button labeled "Fill In View." Either one of two fill-in methods can be used. Direct entry fill-in in the text box in the lower portion of the screen may be done. The fill-in can be completed from a completed field from the PR or the solicitation form. Click on the *Insert* button (in the lower right-hand corner) and select the information required from the *Insert Pop Up Screen*.

## Fill In Screen

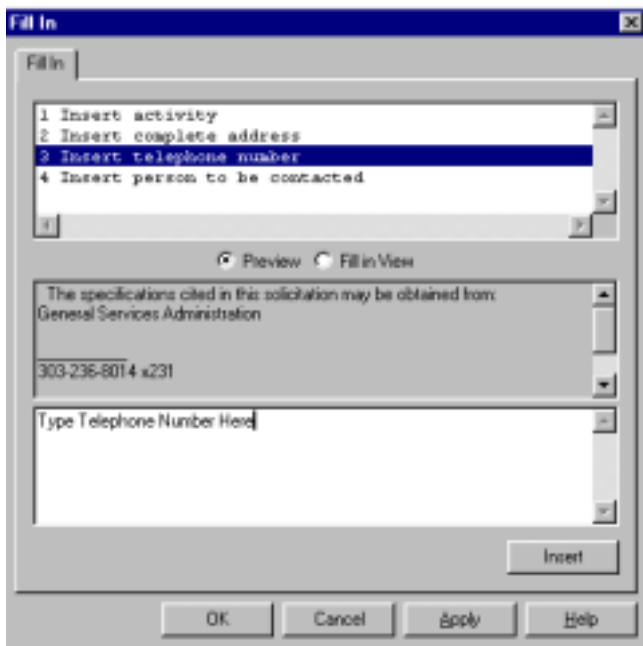


Figure 38

## Insert Item Screen

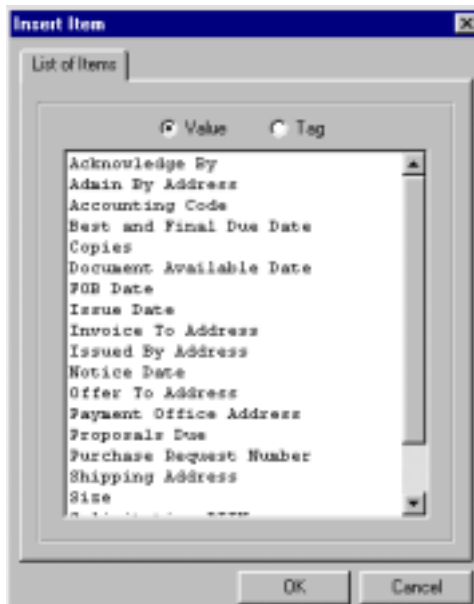





Figure 39



The value radio button will enter a value (e.g. number of days) and the tag radio button will enter a label.


Click on the  button, if no information is listed on the *Insert Item Pop Up Screen*. Click on the item listed in the upper half of the fill in menu, type information required in the lower half of the fill-in menu (fig. 38). Click on the  button after each fill-in. As clauses have fill-ins completed, the clause is removed from the fill-in list. After completing the process, click on the  button, this will bring you to the *Solicitation Document Summary Screen*.



*Hint: If exiting before completing all fill-ins, select "File" and "Close" to return to the Solicitation Document Summary Screen.*

It is recommended to choose one of the matrices provided on the pull-down menu in matrix management. If it is necessary to tailor clauses to your specific needs, delete or add clauses accordingly.

To delete a clause, highlight it and click on the  icon or choose "File" and "Delete" from the menu bar. A message will appear to confirm the deletion process. Click on the  button or "Cancel." If the clause is a required/mandatory clause, CSTARS will NOT allow its deletion.

To add a clause that is not in the matrix from the *Solicitation Document Browser*, click on  or "File" from the menu bar, then choose "New" and "Clause" from the drop-down menu. This opens the "Clause " screen where clauses can be added by full text, reference, etc. The screen below can be used to add or change clauses. When a clause is selected in the *Solicitation Document Browser*, designate the section it will appear in on the *Clause Screen*.



*Note: Inserted clauses appear at the top of the clause list. However, they will be printed out in the correct order.*

Click on "File" and "Open" for the *Clause Screen* to appear with the chosen clause. To exit, click on the  button.



*Note: If a second matrix is added, duplicate clauses must be deleted manually.*

## Clause Screen

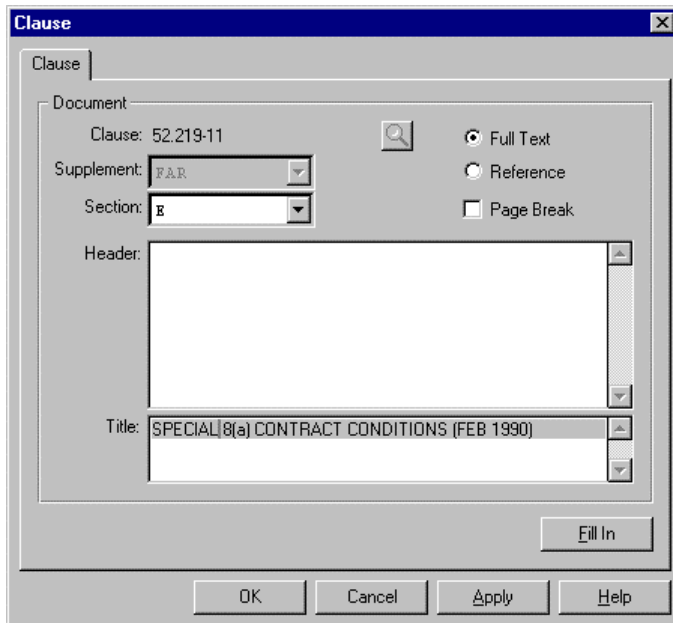


Figure 40



*Note: Clauses like 52.212-5 will remain incomplete unless all references are checked, as applicable.*

### Text Section



*Note: All documents to be attached to any solicitation section and printed will be selected using the following procedures.*

At the *Solicitation Document Browser* select “File” from the menu bar, then choose “New” and “Text File” from the drop-down menu. The *Document File Screen* will appear.

Include all attachments here.



*Note: Prerequisite: A document for each section must have been previously created, as this file path will not transfer the user to MS Word to create a file.*

## Document File Screen

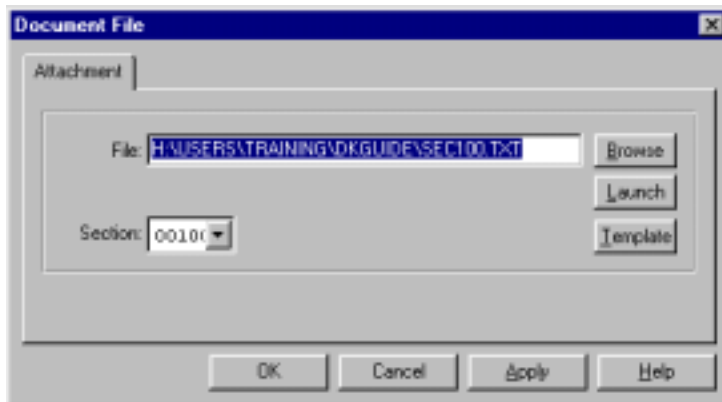




Figure 41

Review and enter data as follows:

Path:	Enter the path (including the document name) of the file to be incorporated into the <i>solicitation</i> .  See bureau-specific guidance for path for CSTARS supporting documents.
-------	---

Press the <Tab> key to select the *solicitation* section.

Section:	Defaults to the first section of the <i>solicitation</i> . Change to the appropriate section where the text will be printed.
Browse:	Browse through the documents, highlighting the document path of an existing document into the path field.
Launch:	Opens the document.
Template:	N/A. Reserved for future use.  See bureau-specific guidelines.



See Addendum: See bureau-specific addendum for instructions.

The *Select One File . . . Screen* appears when the *Browse* button is selected.

## Select One File . . . Screen

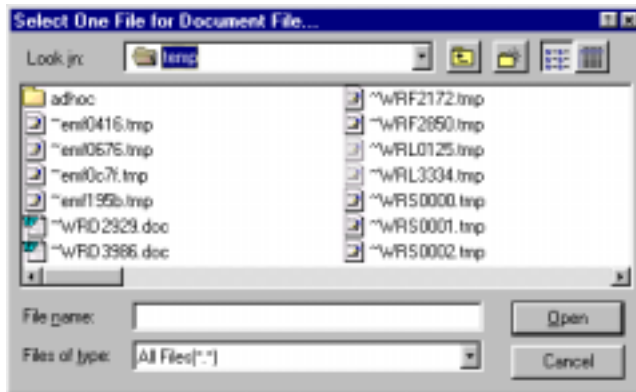





Figure 42

Locate the document desired, and then click the  button to return to the *Document File Screen*. Click the  button, and note that the text attachment is now listed on the *Solicitation Document Browser* as part of the document.

Continue this process for all sections of the solicitation containing specifications, special conditions and provisions, and exhibits.

When you are finished attaching files, click on the  button on the *Document File Screen* to return to the *Solicitation Summary Screen*.

## Printing a Solicitation Document

### Solicitation Summary Screen

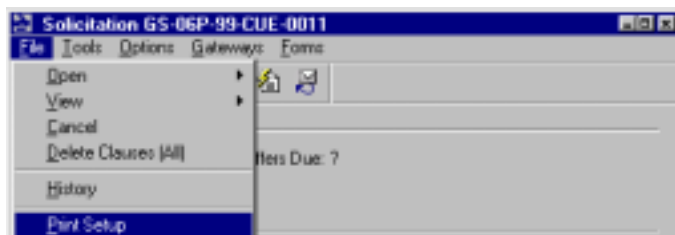


Figure 43

From the *Solicitation Summary Screen* select “File” from the menu bar, then choose “Print Setup” from the drop-down menu and the *Printer Setup Screen* will appear.

## Printer Setup Screen

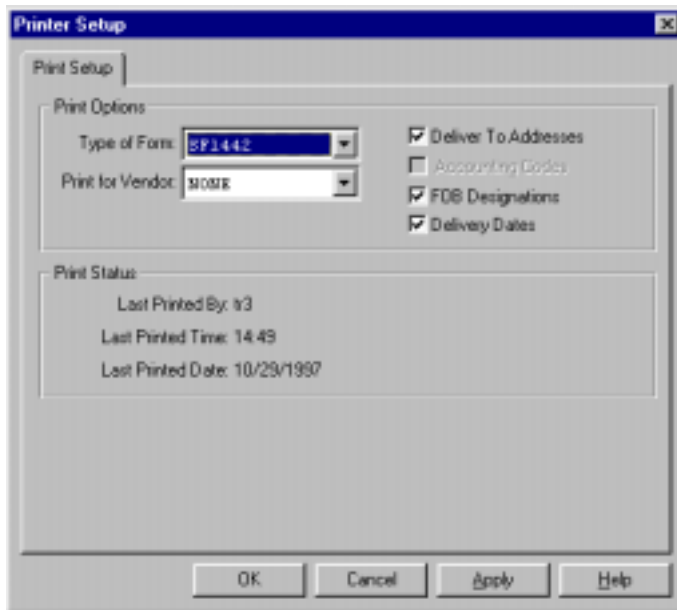



Figure 44

Review and enter data as necessary.

Type of Form:	Defaults to the form selected on the <i>Solicitation Admin Screen</i> . Verify the selection is correct. To change it, choose one of the following forms:  <i>SF 33</i> — Solicitation, Offer and Award <i>SF 1417</i> — Pre-Solicitation Notice (Construction Contracts) <i>SF 1442</i> — Solicitation, Offer and Award (Construction, Alteration, or Repair) <i>SF 1447</i> — Solicitation/Contract <i>SF 1449</i> — Solicitation/Contract/Order for Commercial Items
Print for Vendor:	Choose “None” to print one copy.
Print Options:	Choose any of the following options as applicable at the line item level: “Deliver To Addresses,” “Accounting Codes,” “FOB Destinations,” and/or “Delivery Date.”

When the *Printer Setup Screen* is complete, select the  button.

To print, either select “File” and “Print” from the menu bar or the *Printer* icon. CSTARS will process the document and give you a document preview. When ready to print, click the *Print* button on the *Print Preview Screen* which appears and select print options from the *Print Options Screen* which appears. Click *OK* to print. When the printing has been completed, click on either the *Close* button or on the  icon on the screen to return to the *Solicitation Summary Screen*.

## Issuing a Solicitation

### Solicitation Summary Screen

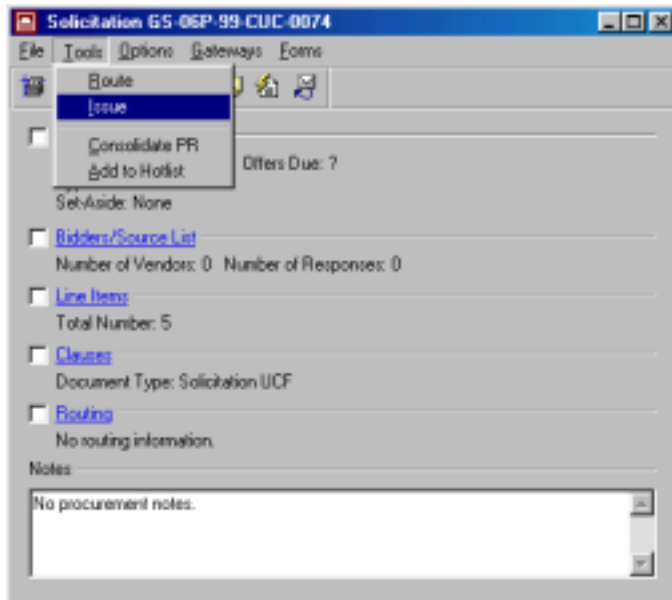


Figure 45

Select "Tools" and "Issue" from the menu bar.

### Issue Solicitation Screen

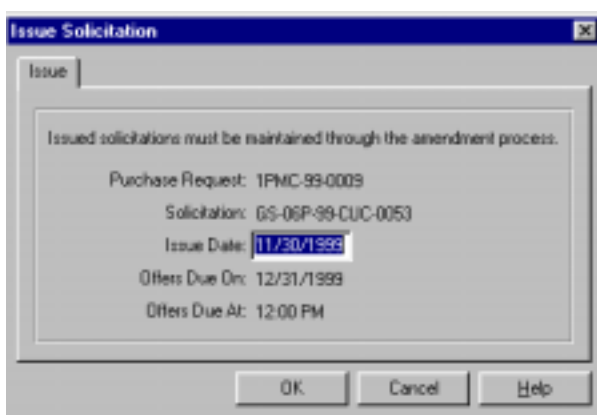
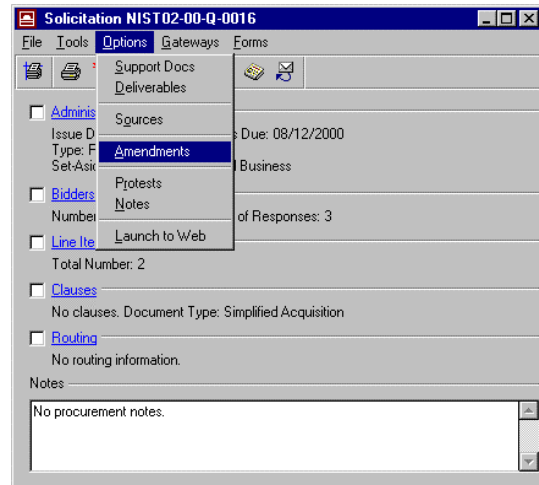


Figure 46

Defaults to original issue date. At this time, the issue date can be changed if necessary. Click on the **OK** button and return to the *Solicitation Summary Screen*.




## Solicitation Summary Screen (Contracting & Purchasing subsystem)



*Figure 48*

## Amendments for Solicitation Browser



From the pull-down menu, select the  icon (or select “File” from the menu bar and “New” from the drop-down menu). A prompt screen will appear requiring an amendment number. Enter "01," "02," "03," etc. (CSTARS does NOT default to the next amendment number.)

## Create Amendment Prompt Screen

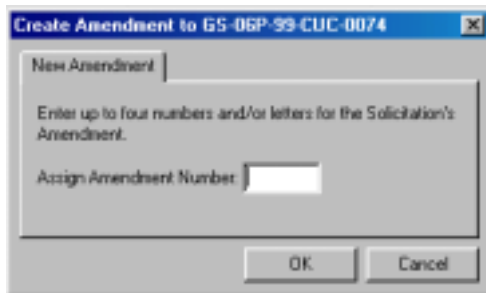

A screenshot of a Windows-style dialog box titled "Create Amendment to GS-06P-99-CUC-0074". It has a tab labeled "New Amendment". The text inside says "Enter up to four numbers and/or letters for the Solicitation's Amendment." Below this is a label "Assign Amendment Number:" followed by a text input field. At the bottom are "OK" and "Cancel" buttons.

Figure 50

Enter an amendment number, and then hit the  button. CSTARS returns to the *SF 30 Admin Screen*, which contains information pertinent to the amendment being developed.

## Solicitation Amendment Tab Control Screen

### SF30 Admin Screen

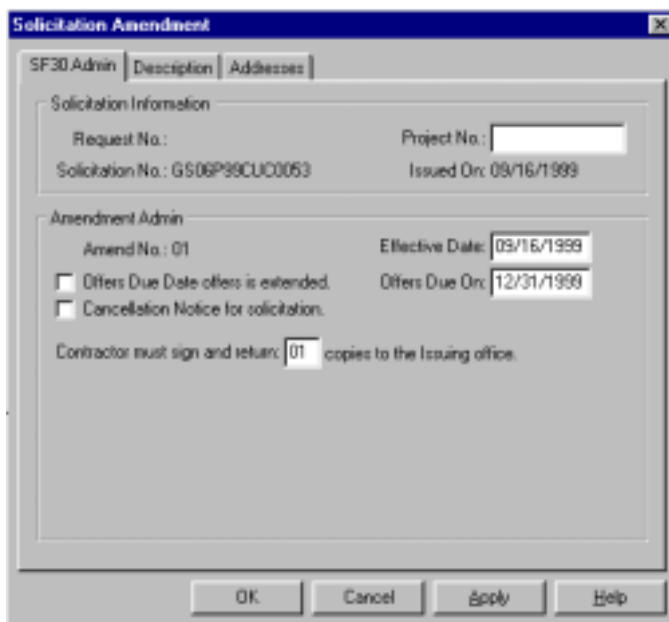

A screenshot of the "Solicitation Amendment" window. It has a tab control with "SF30 Admin", "Description", and "Addresses". The "SF30 Admin" tab is active. It contains two sections: "Solicitation Information" and "Amendment Admin".  
Under "Solicitation Information":  
Request No.: [empty]  
Project No.: [empty]  
Solicitation No.: GS06P99CUC0053  
Issued On: 09/16/1999  
Under "Amendment Admin":  
Amend No.: 01  
Effective Date: 09/16/1999  
There are two checkboxes: "Offers Due Date offers is extended." and "Cancellation Notice for solicitation.", both of which are unchecked.  
Offers Due On: 12/31/1999  
Contractor must sign and return: 01 copies to the Issuing office.  
At the bottom are "OK", "Cancel", "Apply", and "Help" buttons.

Figure 51

Review and enter data as follows:

Project No.:	Defaults from the <i>Solicitation Admin Screen</i> , or enter eight-digit “Project Number,” if applicable.  See bureau-specific guidelines.
Effective Date:	Defaults to the current system date. To overwrite, enter format as MM/DD/YYYY.
Offer Due Date:	Mark the box if the date specified for receipt of offers has been extended.
Copies Returned:	Enter the number of copies of <i>SF 30</i> to be returned by the contractor.

Click on the *Apply* button and save to database. Next, click on the *Description* tab.

## **Description Screen**

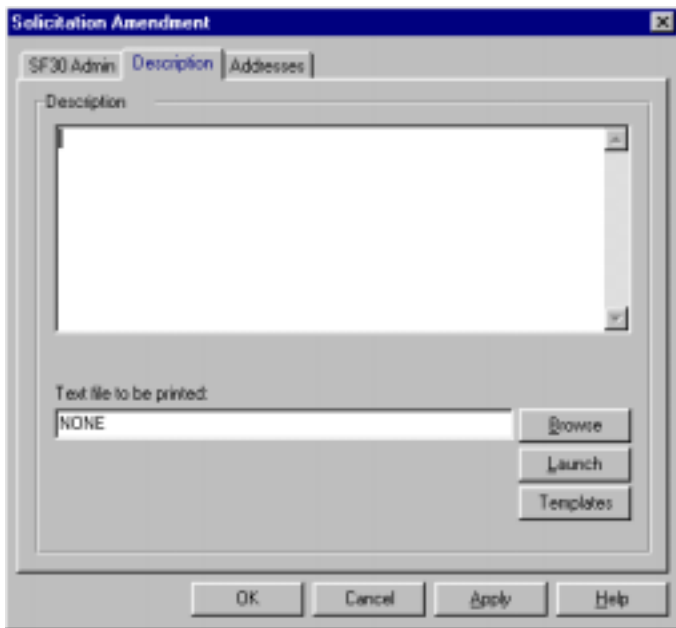



Figure 52

Description:	Enter a brief description of the amendment. Do not exceed 12 lines of text (or 2,300 characters). If the description exceeds the limits, use the “Text file to be printed” section below.
Text file to be printed:	Enter path of text file describing its purpose. Develop this file outside CSTARS and pull path up with browser or enter path (as in previous instructions).

If you are importing a text file from MS Word, use the *Browse* and  buttons to bring the text in.



*Note: Changes in the Offers Due date must be entered in the Description Text for Block 14 of the SF30.*

Click on the  button to save to database. Click on the *Addresses* tab.

## Addresses Screen

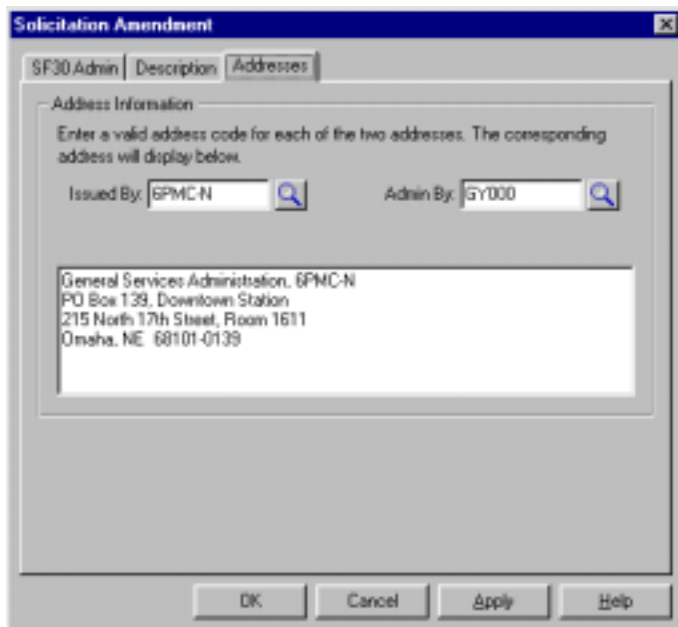



Figure 53

Issued By:	Defaults from the <i>Solicitation Admin Screen</i> , or enter the code of the issuing office.
Admin By:	Defaults from the <i>Solicitation Admin Screen</i> , or enter the code of the administering office

This screen defaults to previous data entered regarding the solicitation. Review the *Addresses Screen* to make sure everything is correct.

To make other administrative changes or to change line items or the contents of a document, click on “File,” “Open,” and the appropriate section: “Admin,” “Line Items,” or “Clauses.” Be sure to change the “Offers Due” date on the *Admin Screen* if the receipt date is being extended.

Line items can be changed, added, or deleted in the *Solicitation Line Item Browser*, as can text files or clauses in the solicitation document. See the section of this manual entitled “Finalizing Solicitation Document” for details on these procedures. Change records as necessary by pressing the <Tab> key between fields, then pressing the  button to return to the *Amendment Browser*.

## Printing a Solicitation Amendment

To print the *SF 30*, highlight the amendment to be printed on the *Solicitation Amendment Browser*, select “File,” and then “Print.”

### Solicitation Amendments Browser

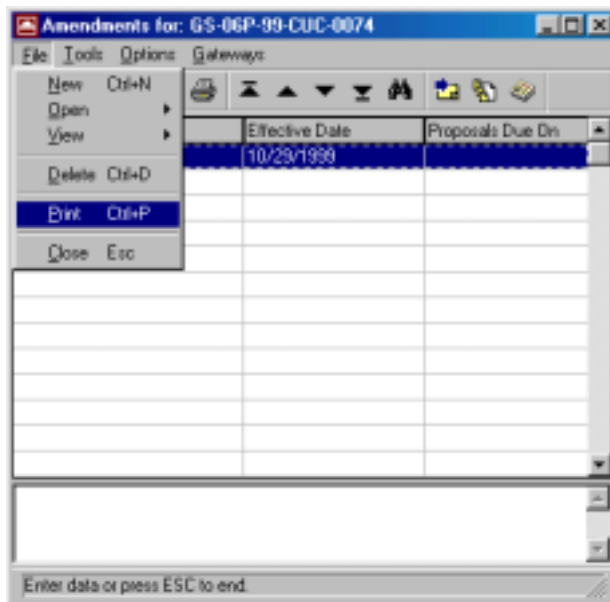


Figure 54

CSTARS will open a copy of the *SF-30* in MS Word. After printing the *SF-30*, close out of MS Word to return to CSTARS *Amendment Screen*. To address the amendment “All Prospective Offerss,” insert within MS Word; otherwise, the address is blank.

## Creating a Bid/ Offer Abstract



**Note:** *Prerequisite: A solicitation must have already been issued in CSTARS. And a Bidders Mailing List must already exist for the solicitation before any new vendors can be added.*

Before creating the bid abstract from the *Solicitation Summary Screen*, open the *Bidders' Mailing List Screen* by clicking on “Options” and “Bidders' Mailing List.” Once in the *Bidders' Mailing List Browser*, verify that all vendors who responded to the solicitation are listed.

## Solicitation Summary Screen (Contracting & Purchasing subsystem)

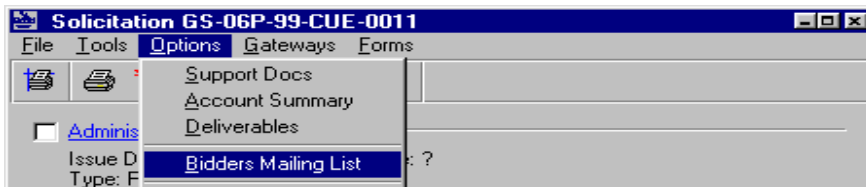


Figure 55

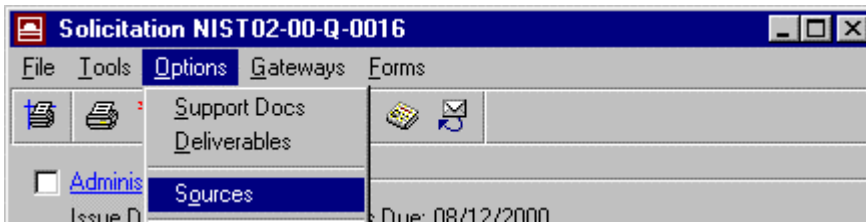




Figure 56

To add a vendor who submitted a bid/offer to the current list, click on the  icon for the *Add Bidders Browser* to appear, highlight the bidder/offeror's name, and click on the "Select" button. If the vendor is not in the master list, contact the System's Administrator to have the vendor added. Click the  button in the upper right-hand corner when finished. Note that the vendor(s) that you added now appear on the *Bidders Mailing List Screen*.

Click on "Tools" and "Enter Bids." The *Bidder Bids Browser* will display.

## Bidder Bids Browser

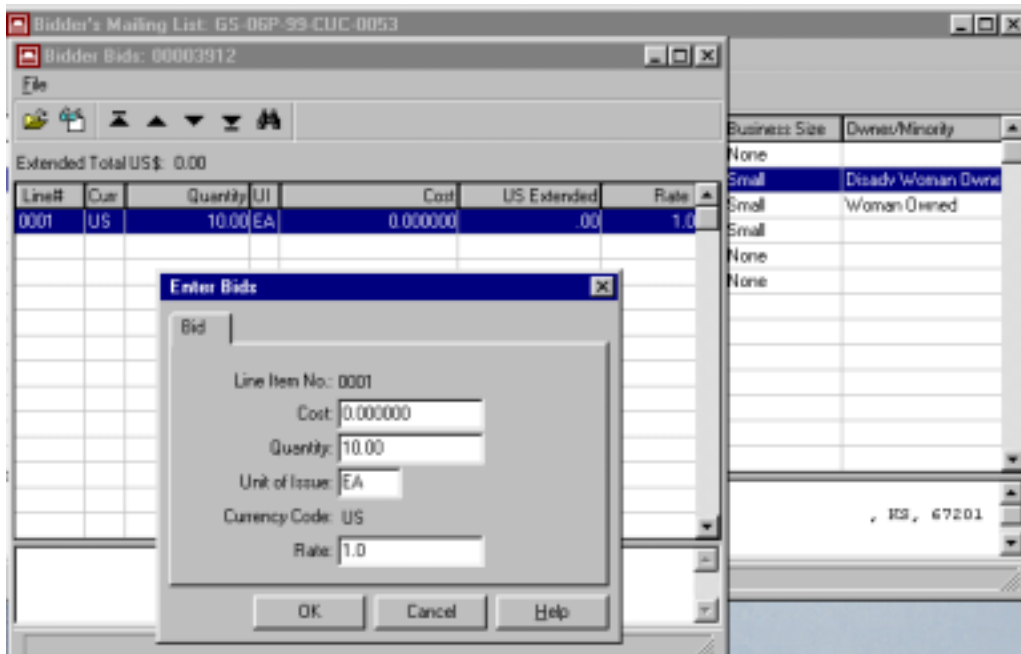





Figure 57

The Bidders' List will appear for data input whether or not a response was received and bids/offers were received. Highlight a vendor who submitted a bid/offer, and click on "File" from the menu bar and then choose "Open" from the drop-down menu. The *Enter Bids Box* will appear.

Highlight the first line item, and click on the  icon. Enter the bid/offer received in the *Enter Bids Box*, and then press the  button to move to the next line item. Repeat for all line items. After the last line item has been completed, CSTARS will return to the *Bidder Bids Browser*.

Repeat for each vendor who submitted a bid/offer. Click the  button to return to the *Bidder Bids Browser*.

## Printing a Bid/Offer Abstract

At the *Bidder's Mailing List Browser*, select "File" from the menu bar, then select "Print," "Reports," and "Bid Report (1409)" or "Summary Report" from the pull-down menu. If "Bid Report (1409)" is selected, each vendor who submitted a bid/offer is displayed individually per page, and the report prints automatically. If "Standard" or "Summary Report" is selected, all vendors listed on the solicitation's *Bidders' Mailing List* will be displayed on the report.

## Supporting Documentation



*Note: Prerequisite:* An abstract must have already been prepared for a solicitation that has closed.

### Source Selection

Click on the [Bidders/Source List](#) hypertext link. The *Bidders' Mailing List Browser* will display.

### Bidder's Mailing List Browser

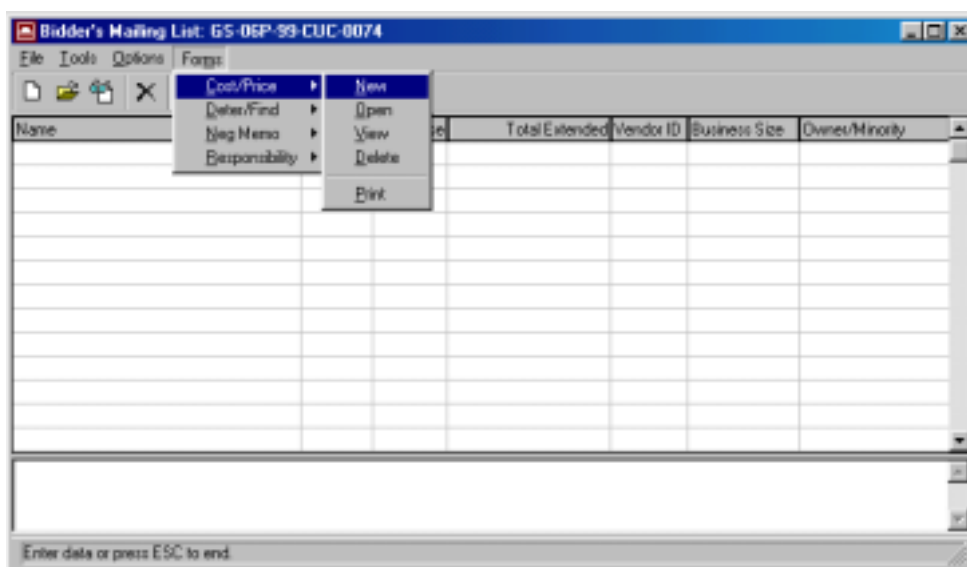


Figure 58

### Cost/Price Form

Click on "Forms" and "Cost/Price". This form is available to assist in the creation of a Cost/price Analysis document. Click on "New," and *Screen 1* will appear. Enter data as requested, and press the <F2> key to continue.

## Cost and Price Analysis Worksheet Screen

Contractor Name: HSHACKELFORD & ASSOCIATES INC  
 Request: TERTS - - - Solicitation: GS05P00CUC0010  
 Request Date: 06/03/97 Solicitation Date: 10/25/99

	Contractor Price	Government Price	Competitive Price
Material:	\$ 0.00	\$ 0.00	\$ 0.00
Direct Labor:	\$ 0.00	\$ 0.00	\$ 0.00
Indirect Costs:	\$ 0.00	\$ 0.00	\$ 0.00
Other Costs:	\$ 0.00	\$ 0.00	\$ 0.00
Mgmt Costs:	\$ 0.00	\$ 0.00	\$ 0.00
Royalty Costs:	\$ 0.00	\$ 0.00	\$ 0.00
Total Costs:	\$ 0.00	\$ 0.00	\$ 0.00

Figure 59

### Determination and Findings Form

Click on "Forms" and "Deter/Find." This form is available to assist in the creation of a Determination and Findings document. Click on "New," and *Screen 1* will appear. Enter data as requested and press the <F2> key to continue (a total of 3 screens will require information). Press the <F2> key to return to the *Bidders Mailing List*.



See Addendum: See bureau-specific addendum for instructions.

## Determination and Findings Justification Screen

Determination and Findings Justification - Screen 1

DE Date: 11/02/99

Request: TEST3 - - - Solicitation: GS06P00CUC0010

Request Date: 06/03/97 Solicitation Date: 10/25/99

Agency: General Services Administration

Office of Business and Support Services

1500 East Bannister Road Room 1161

Kansas City, MO 64131-3088

Agent Code: SA1 Agent Phone:

Agent Name: SA for GSA (Training)

Description of Action Being Approved:

[Multi-line text input area]

Figure 60

### Negotiation Memorandum Form

Click on "Forms" and "Neg/Memo." This form is available to assist in the creation of a Price Negotiation Memorandum document. Click on "New," and *Screen 1* will appear. Enter data as requested and press the <F2> key to continue (a total of 3 screens will require information). Press the <F2> key to return to the *Bidders Mailing List*.



See Addendum: See bureau-specific addendum for instructions.

## Pre/Post Negotiation Memorandum Screen

Pre/Post Negotiation Memorandum - Screen 1

Neg Memo Date: 11/02/99

Request: TEST3 - - - Solicitation: GS06P00CUC0010

Agent Code: SA1 Agent Phone:

Agent Name: SA for GSA (Training)

Purpose:

Description of Acquisition:

Figure 61

### Responsibility Form

Click on "Forms" and "Responsibility." This form is available to assist in the creation of a Responsibility Determination document. Click on "New," and *Screen 1* will appear. Enter data as requested and press the <F2> key to continue (a total of 3 screens will require information). Press the <F2> key to return to the *Bidders Mailing List*.



See Addendum: See bureau-specific addendum for instructions.

## Determination of Contractor Responsibility Checklist Screen

Checklist Questions	Yes/No
Is the prospective contractor the sole source of the required service?	<input checked="" type="button" value="No"/>
Has the contractor been selected after consideration of more than one source of supply?	<input type="button" value="No"/>
Does the prospective contractor have adequate financial resources to perform the contract, or the ability to obtain them?	<input type="button" value="No"/>
Will the prospective contractor be able to comply with the required or proposed delivery or performance schedule, taking into consideration all existing commercial and governmental business commitments?	<input type="button" value="No"/>
Does the prospective contractor have a satisfactory performance record?	<input type="button" value="No"/>
Does the prospective contractor have a satisfactory record of integrity and business ethics?	<input type="button" value="No"/>

Figure 62

Click on the  button in the upper right-hand corner of the screen to return to the *Solicitation Summary Screen*.

### Protests

This screen is available to record protests received in response to a solicitation. From the *Solicitation Summary Screen*, select “Options” from the menu bar and “Protests” from the drop-down menu, and the *Protest Summary Browser* will display.

## Protest Summary Browser

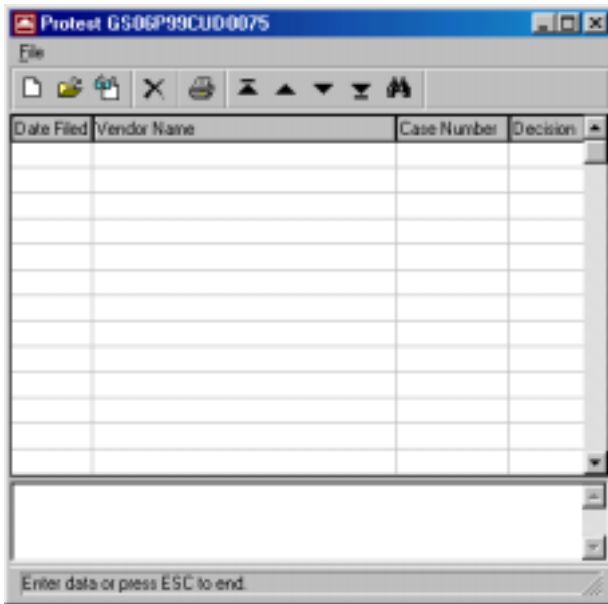



Figure 63

Enter new protest data by clicking "File" from the menu bar, select "New" from the drop-down menu, then enter the requested data.




*Note: Vendor must be loaded in the Vendor File, in order to complete the first data entry and you must have vendor ID available because once in the Protest Summary Screen, there is no look up. Press the <F2> key to accept the vendor and complete the necessary required information. Press the <Tab> key to navigate through the Protest Record Screen. Press the <F2> key and the Protest Summary Browser will display. To exit, click on the  button. CSTARS will display the Solicitation Summary Screen.*



*Hint: If record cannot be continued, press the <Esc> key.*

### Supporting Documents List

A list of supporting documents developed during a procurement and their location can be generated. From the *Solicitation Summary Screen*, select "Options" from the menu bar, then choose "Support Docs" from the drop-down menu. The *Supporting Documentation Browser* will display. Click on the  icon and the *Supporting Documentation Screen Tab Control Screen* will display.

## Supporting Documentation Tab Control Screen

### Location Screen

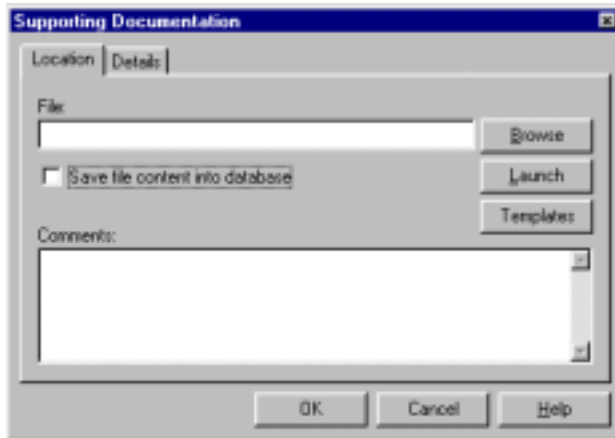


Figure 64

Entering data into this screen helps track where supporting documents are before they are incorporated into an individual solicitation record. Enter data as follows:

File:	Type the full path where the text file has been saved.
Save into Database:	Click in the box to save the document into the database. Protects the document from being lost by saving into the CSTARS database.
Comments:	Enter any comments that will help identify the file.

### Details Screen

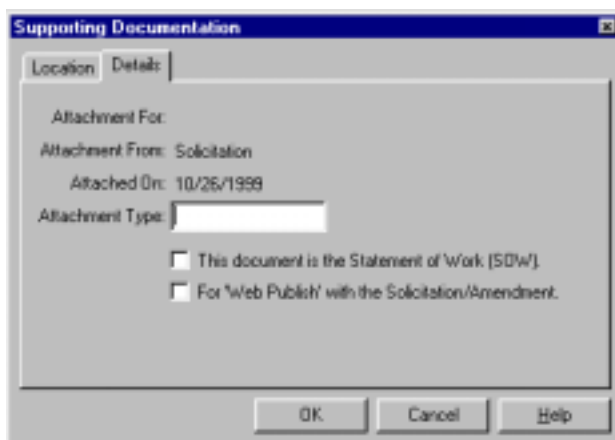




Figure 65

Enter data as follows:

Attachment Type:	This is a free form field. There are no "types" provided by CSTARS for selection. Examples include: *.doc (for MS Word), *.xls (for MS Excel) and *.txt for text files.
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Click on the  button again to return to the *Solicitation Documentation Browser* and to return to the *Solicitation Summary Screen*. Clicking on the  button again in the upper right-hand corner of each screen to return to the CSTARS Desktop.

Congratulations! You have successfully completed the solicitation!